

For other non-metallic minerals (if the small production of peat normally included with fuels is deducted) and clay products, and structural materials, returns to the producing industries are the same in each case as the total value of the mineral commodities produced.

The Growth of the Mining Industry in Recent Years.—Annual publication of industrial statistics of the mining industry, showing capital employed, the number of employees, the salaries and wages paid, the cost of fuel and electricity, and the net value of the products did not commence until 1921. In connection with the item of capital, operators were requested to report *only the capital actually invested in the enterprises*, including (1) cost of lands, buildings, plant, machinery and tools, (2) cost of materials on hand, supplies, finished products and ore on dump, and (3) cash, trading and operating accounts and bills receivable. It should be specially noted that no estimate of undeveloped ores was included in the capital.

The substantial growth of the mining industry in Canada during the post-war decade is established by the summary statistics of Table 6. From 1922 to 1929—a period of slowly declining prices—the output increased by 72 p.c., capital investment by 76 p.c., employment by 53 p.c., and the salaries and wages paid by 65 p.c. Progress was most rapid in the metallic mineral industries, where the expansion in net production amounted to 170 p.c. with proportionate increases in capital and employment. The period from 1922 to 1929 was marked by a rising cycle of activity in construction. This is reflected in the expansion of industries engaged in the production of clay products and other structural materials. The output of this group of industries increased by 47 p.c. during the period, while within the group progress was much greater in industries producing cement, gravel and stone than in the clay products industries. The group of non-metallic mineral industries remained relatively stationary in contrast to the other two main groups during this period of rapid expansion. This may be attributed to the fact that coal mining is the predominant industry in the non-metallic group and, under increasing competition from oil fuels and hydro-electric power, did not participate in the general industrial expansion of the period.

Under the influence of the world-wide depression, there has naturally been a recession in the mineral industries generally. As was to be expected, the decline since 1929 has affected the reported capital (3 p.c. lower) much less than employment (23 p.c. lower), output (24 p.c. lower) or salaries and wages (26 p.c. lower). The non-metallic mineral industries appear to have suffered most in spite of the fact that they participated so little in the previous expansion. Their salaries and wages and their net sales dropped to a lower point in 1931 than at any time during the years shown. The mineral industries producing various structural materials in 1931 still had a wage bill and an output larger than in 1926. The price decline in these materials was not severe and demand for them was somewhat maintained by some large construction enterprises and by public works' programs, road improvements and so forth. The metallic mineral industries, although showing the greatest expansion up to 1929, had declined the least from that point in 1931. Their salaries and wages and net sales were still above the 1927 level in spite of the drastic declines in the prices of a number of the metals. A number of the industries within this group have been helped by the relative rise in the value of gold. However, the figures are strong evidence that Canada's metal-producing industries have been established upon a solid foundation since, after so rapid an expansion, they have been able to withstand so well the shock of the depression.